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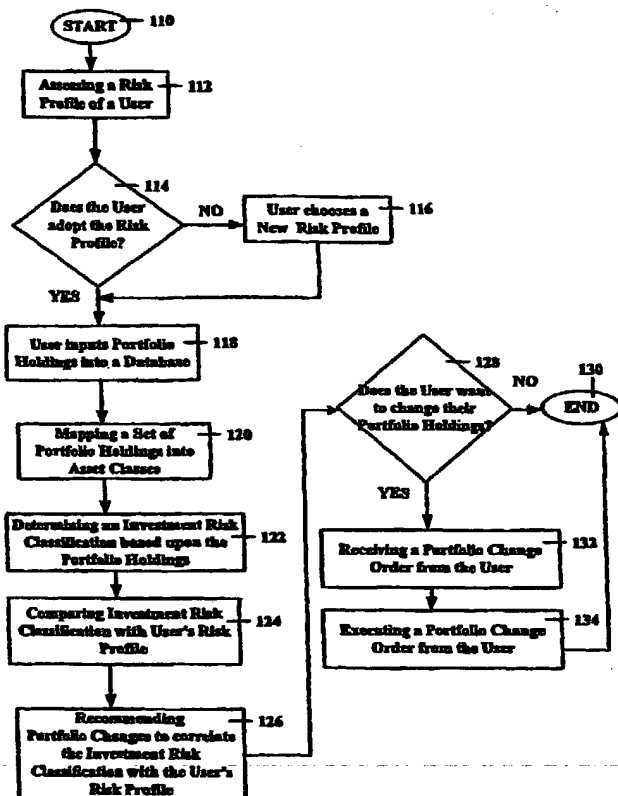
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(54) Title: AUTOMATED INVESTMENT ADVISORY SOFTWARE AND METHOD



(57) Abstract: A web-based investment advisory system and method to assist financial advisors in delivering personalized investment advisory services to investors. An advisor assesses a client's investment profile (112) for evaluating the risk dimensions of the client's current portfolio holdings (118), compares investment risks classification based upon portfolio holdings (122), recommends specific portfolio changes (132) based on asset classes to create an optimized portfolio for the client's investment profile and suggests specific investment products available through the advisor and integrates with the advisors trading platform for executing purchase and sales orders (134).

WO 01/43037 A1